

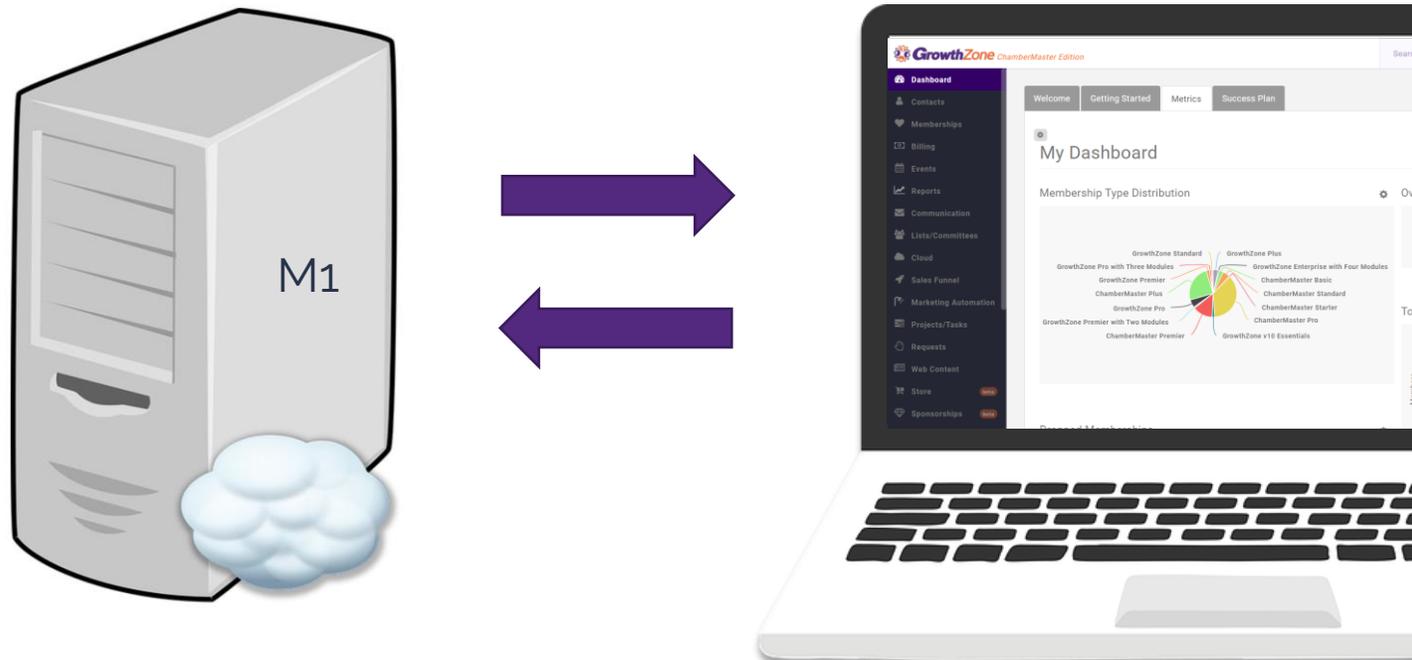
GrowthZone: M1 Daily Activities

Overview

The GrowthZone integration with the National Association of REALTORS' NRDS/M1 database provides association staff an easy way to manage their contacts' NRDS/M1 data adding and updating in GrowthZone then syncing those records to M1.

Overview

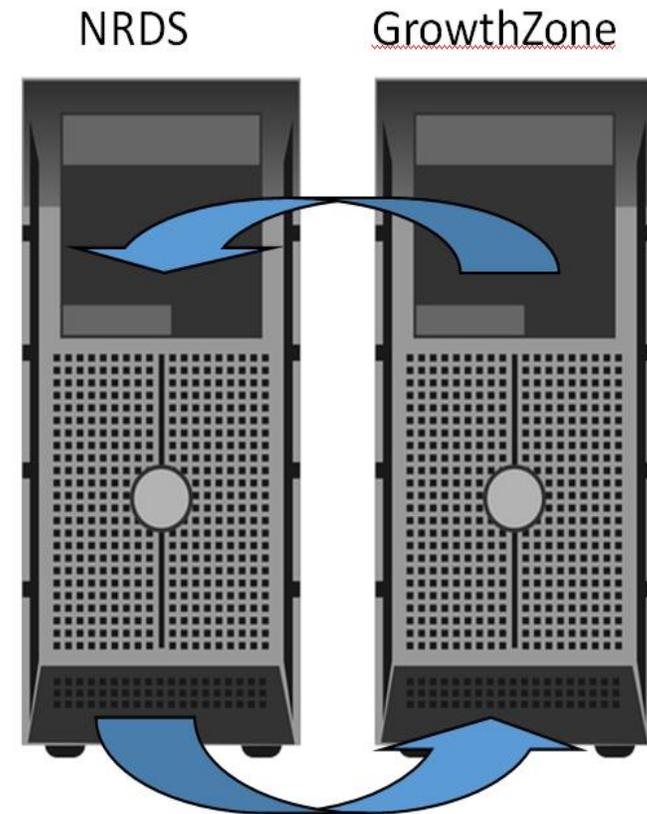
Data entered or changed in GrowthZone is automatically pushed to M1, thereby updating agent and office records from one central location.



2 Way Sync

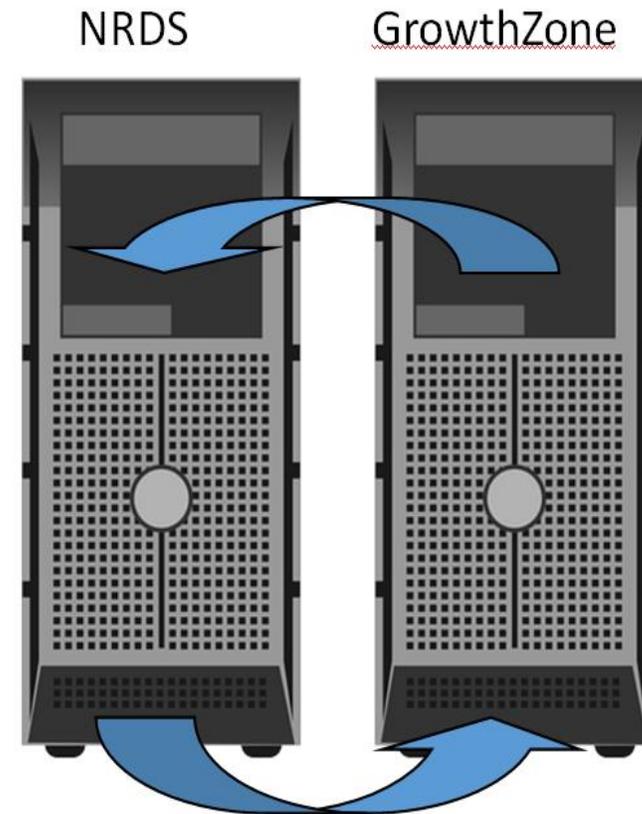
Within the NRDS/M1 system, there is a “sub queue” that enables NRDS/M1 to exchange information with GrowthZone.

A sub queue is maintained for each POE.



2 Way Sync

- ✓ Every add/change that occurs in NRDS/M1 that is "of interest" to this POE but not done by them publishes in this sub queue
- ✓ Every 5 minutes, GrowthZone will check the sub queue and update the GrowthZone records
- ✓ KB: [NRDS/M1 Sub Queue Processing](#)



2 Way Sync

Once the sync is live, no interaction is required on your part to gather changes from the sub-queue. Every 5 minutes, GrowthZone will check the sub-queue for updates. This ensures that GrowthZone and NRDS/M1 are always in sync.

Search... Recent Events Customise Results...
Result Count: 3 Date range: between 8/30/2020 and 9/2/2020 [Clear All]

Name	NRDS Id	Tags	Primary Contact Display Name	Activity Date	Field Name	Change Details
Cena Bloden	212212122	Member	Berks Service	9/1/2020 12:10 PM	NRDSPreferredMailType	NRDS Preferred Mail changed from (Mailing) to (OfficeMailing) by NRDS.
Cena Bloden	212212122	Member	Berks Service	9/1/2020 12:10 PM	NRDSPreferredPublicationType	NRDS Preferred Mail changed from (Mailing) to (OfficeMailing) by NRDS.
Bella Bloom	206020601	Member	First National	9/1/2020 9:00 AM	PMMLSOnlineStatusChanged Date	PM MLS Online Status Changed Date changed from (8/24/2020 5:00:00 AM) to (8/24/2020 12:00:00 AM) by NRDS.

What is “of interest”?

- Agent: Adds, changes and transfers. These are published to the sub queue of the member's primary and secondary local and state associations. Transfers are published to the subqueue of the agent's original POE. See [Agent Data](#)
- Office: Adds, changes and transfers. Changes are published to the sub queue of the office's primary and secondary associations. Add Offices are published to the sub queue of the office's primary association. Transfers are published to the subqueue of the office's original POE. See [Office Data](#)

What is “of interest”?

- Education: Adds and changes. These are published to the sub queue of the member's primary and secondary associations. GrowthZone currently only processes the COEC/COEN (Code of Ethics) certifications. See [Code of Ethics Data](#)
- Agent Secondary: Adds and changes. These are published to the sub queue of the member's primary association. See [Secondary Agent Data](#)
- Office Secondary: Adds and Changes. These are published to the POE sub queue of the office's primary local and state associations. See [Secondary Office Data](#)

Setup Considerations – NRDS/M1 ID

If you are the POE for an agent or office, you will have the ability to assign unique NRDS/M1 ID's.

To ensure that you continue your sequence of ID's, GrowthZone will set your starting number. At go live, your project manager will ask for the next NRDS/M1 ID in your sequence.

NRDS Id and Membership Numbers SAVE

Contact NRDS Id

Automatically Assign NRDS Id To Agents

Automatically Assign NRDS Id To Offices

Distinct Office Ids

Enforce NRDS Id Uniqueness

Next NRDS Id Assigned **When to assign**

Membership Numbers

Automatically Assign Membership Numbers

Enforce Membership Number Uniqueness

Next Membership Number Assigned **When to assign**

[Need Help?](#)

Initial Setup Considerations

If you are using NAR Ecommerce you will configure a default NRDS/M1 Id to be used when a payment is processed for a contact who does not have a NRDS/M1 ID

NRDS Id and Membership Numbers

Contact NRDS Id

Automatically Assign NRDS Id To Agents Automatically Assign NRDS Id To Offices Distinct Office Ids

Next NRDS Id Assigned
831010042

Contact Assignment Trigger Type
When created

Membership Numbers

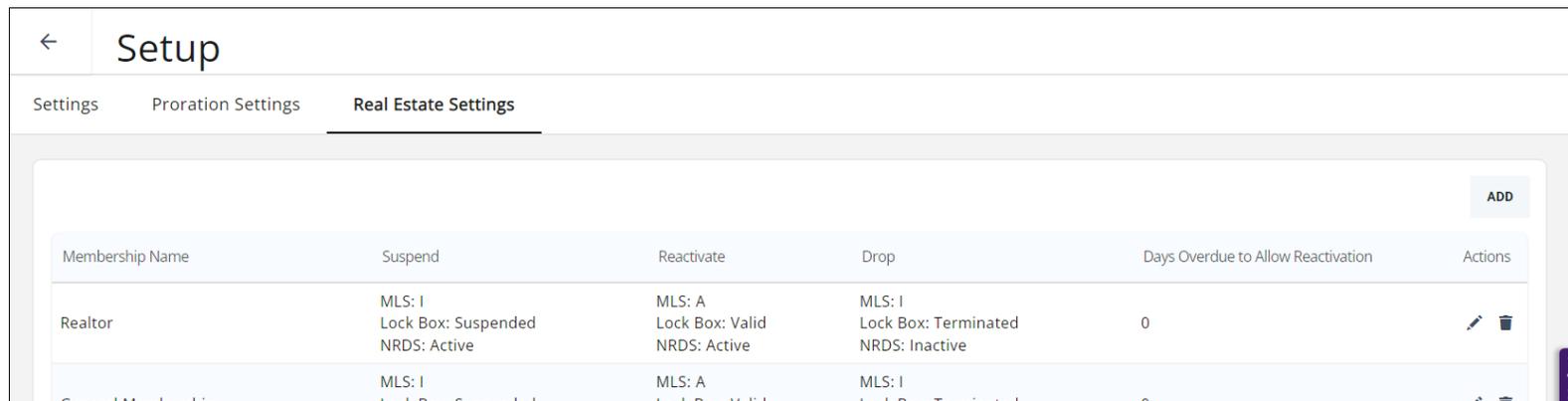
Automatically Assign Membership Numbers Enforce Membership Number Uniqueness When to assign
When created

[Save](#)

Initial Setup Considerations

Do you wish to tie Membership Status to NRDS/M1 Status?

- If you wish the system to automatically update the NRDS/M1 status when membership is dropped, suspended or reactivated you will do this during initial setup
- Best Practice – test this out in staging or clone first



Membership Name	Suspend	Reactivate	Drop	Days Overdue to Allow Reactivation	Actions
Realtor	MLS: I Lock Box: Suspended NRDS: Active	MLS: A Lock Box: Valid NRDS: Active	MLS: I Lock Box: Terminated NRDS: Inactive	0	 
General Membership	MLS: I Lock Box: Suspended	MLS: A Lock Box: Valid	MLS: I Lock Box: Terminated	0	 

Daily Activities

- ✓ Add/Activate a New Office/New Agent
- ✓ Transfer an Agent to Your Board
- ✓ Enter an Agent as a Secondary Member
- ✓ Change an Agent Contact Information
- ✓ Link a Broker to Another Office
- ✓ Transfer an Agent to another Office
- ✓ Inactivate an Agent/Office in NRDS/M1
- ✓ Enter Code of Ethics Training
- ✓ Tracking Activity and Reports

Add Offices to NRDS/M1



Follow the rules!

- A DR is required when entering an office in NRDS/M1. And a DR must be associated to an Office before it can be entered into NRDS/M1 ☹.
- Point of Entry (POE) restrictions apply. Only the POE can add or change an office.
- If a records already exists in NRDS/M1 and you are attempting to add, NRDS/M1 will process this as a Change
- Ensure all required fields are populated, and formatted correctly

GrowthZone simply passes data on... you must follow the same rules you would follow if you are entering offices directly into NRDS/M1. KB: [Data Sent to NRDS/M1 for Offices](#)

Add Agents to NRDS/M1



Follow the rules!

- For R and RA – licenses are required, this is populated on the agent's Profile tab
- Point of Entry (POE) restrictions apply.
- You can not sync records to NRDS/M1 if the agent is inactive in NRDS/M1.
- If a records already exists in NRDS/M1 and you are attempting to add, NRDS/M1 will process this as a Change
- Ensure all required fields are populated, and formatted correctly
- Agents cannot be sent as "orphans" where they are not attached to any office.

GrowthZone simply passes data on... you must follow the same rules you would follow if you are entering agents directly into NRDS/M1. KB: [Data sent to M1 for Primary Agents](#)

New Office/New Agent

Adding a new office & a new agent introduces a unique scenario where the office must exist to add the agent, and the agent must exist to add the office ☹️



Which came first... the chicken or the egg?

Add a New Office/New Agent



Add an Existing Office

If an Office already exists in NRDS/M1, you can add this office to your database. For example, an agent wishes to join your board and per rules they must be associated to an office, which does not exist in your database.



Search NRDS/M1 for Existing Office

Search/Add Office

Search below for existing Offices in NRDS Central database. Results will be displayed below and if a match is selected, data will be populated directly from NRDS. Adding more information to your search criteria can help increase the accuracy of the search results that will display.

Office NRDS ID: Office Name: Adolphson Real Estat State: MN City: Office DR Last Name:

NRDS Search Results

Use suggested - We've found a possible match, see below. 

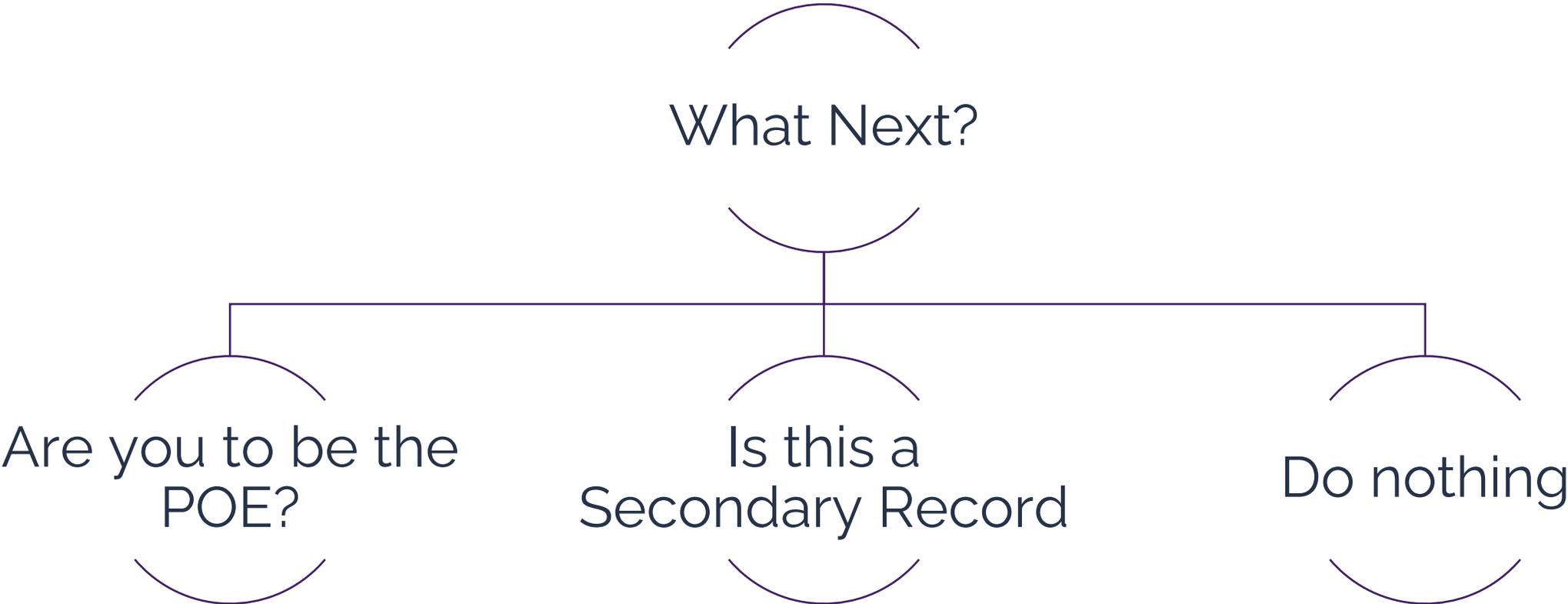
Create new

Office Formal Name	Office NRDS ID	State	City	Office DR Name
<input type="radio"/> Adolphson Real Estate	498500051	MN	Duluth	Leslie Adolphson
<input type="radio"/> Adolphson Real Estate-Cloquet	498500570	MN	Cloquet	Leslie Adolphson

Search NRDS/M1! If the office already has a NRDS/M1 ID and exists, you will be able to pull over data that is already available in NRDS/M1. If you have the office NRDS/M1 ID or the Office DR Name, this is the easiest way to search

KB: [Search NRDS/M1 Database for Office](#)

Existing Office



Are you to be the POE? Transfer an Office

- ✓ The POE requesting the TRANSFER must be the POE of the new Association
- ✓ KB: [Transfer an Office](#)

The screenshot displays the 'Real Estate' tab for '612 Realty Inc.' (ID: 502003879). The interface includes a navigation bar with tabs for Overview, More Info, Real Estate, Agents, Activity, Communication, Billing Setup, Billing, Tasks, Engagement, and Files. A note states: 'NOTE: Your AOR is not the Primary Association for this Office. If this is incorrect, please perform a Transfer in NRDS or by selecting the arrows below in the NRDS Information.' The 'NRDS Office Information' section contains a table with the following data:

Field	Value	Actions
Sync to NRDS	No	Transfer (left arrow) and Refresh (circular arrow) icons
NRDS ID	502003879	
Join Date		
Status	Active	

Other sections include 'MLS - CoreLogic' with an edit and delete icon, and 'MLS Information' with a sync with MLS option set to 'No' and edit/refresh icons. A red arrow points to the transfer icon in the NRDS Office Information table. A vertical 'Need Help?' button is visible on the right side of the interface.

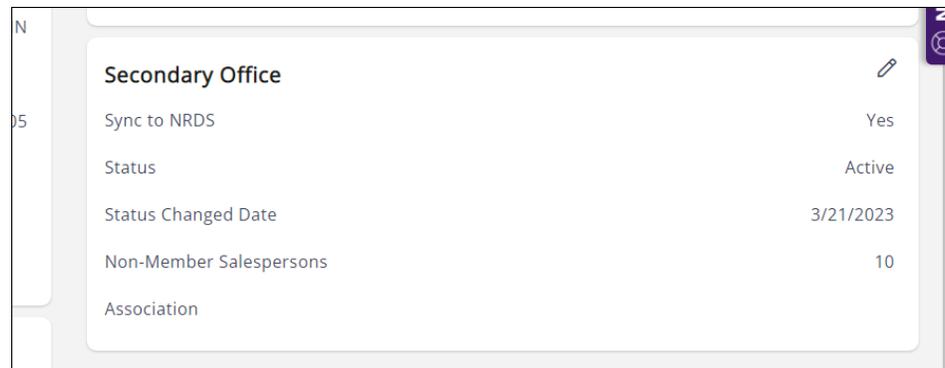
Transfer an Office

If an error occurs in processing, this will be displayed immediately on the screen

3797:Office ID 364590311 Does not exist in the NRDS System

Add as Secondary Office

- The primary association field, in NRDS/M1, indicates which association first added this office.
- If your association also needs to be associated with this office because you have agents linked there, you can add these with via your GrowthZone software, and the supplemental data will be synchronized to NRDS/M1
- KB: [Add Secondary Office](#)



The screenshot shows a configuration form for a 'Secondary Office'. The form is titled 'Secondary Office' and has an edit icon in the top right corner. The form contains the following fields and values:

Sync to NRDS	Yes
Status	Active
Status Changed Date	3/21/2023
Non-Member Salespersons	10
Association	

Activate a new Agent

Non-Member Cecily Tyler ID: 707510129

1 / 143 EDIT AGENT

Overview More Info Real Estate Activity Communication Billing Setup Billing Tasks Engagement Files

Contact Info 5

Work cecily.tyler@mailinator.com

Cell 218-459-8423

Physical and Mailing 21301 Archibald Rd Deerwood MN 56444

Main 218-534-5357

Physical and Mailing 1234 Any Street Deerwood MN 56444

Offices 1

Name	Title	Access Level	Location	NRDS Id
Keller Williams Realty - Deerwood	User - Primary		Deerwood, MN	4

Memberships 0

Tags 0

Related Agents 0

Professional 1

NRDS Information

Sync to NRDS

NRDS

NRDS ID* 707510129

Member Type* Realtor

Active Since* 3/21/2023

Local Join Date* 3/21/2023

POE Association* 70007075

Association ID 7075

Status* Active

Status Changed Date

Primary State* MN

License* 45127896

Primary Field of Business* Office NRDS ID*

IMPORTANT! Adding a membership (on the profile tab) does NOT make the agent active in NRDS/M1!

Add an Existing Agent

The screenshot shows a user profile for Jason Smith (ID: 502031315) with an 'EDIT AGENT' button. The profile is divided into sections: Contact Info, Offices, and Billing. The 'Offices' section contains a table with one entry: Spring Lake Realty, User - Primary, Deerwood, MN, 707510127. A red arrow points from this office name to the 'State' dropdown in the 'Search/Add Member' modal. The modal has search fields for Member ID (502031315), First Name, Last Name, State, and Member RE License, with a 'SEARCH NRDS' button. Below the search fields are 'NRDS Search Results' with radio buttons for 'Use suggested - We've found a possible match, see below.' (selected) and 'Create new'. A table of search results is shown, with one entry highlighted by a red box: Jason Smith, Coldwell Banker Burnet, Minneapolis, MN, Yes. A red arrow points from the 'Use suggested' radio button to the highlighted search result. The modal has 'Cancel' and 'Done' buttons at the bottom.

Name	Title	Access Level	Location	NRDS Id
Spring Lake Realty	User - Primary		Deerwood, MN	707510127

Member ID	First Name	Last Name	State	Member RE License
502031315				

NRDS Member ID	First Name	Last Name	Office Name	Office City	Office State	Is Active	
<input type="radio"/>	502031315	Jason	Smith	Coldwell Banker Burnet	Minneapolis	MN	Yes

Change an Agent/Office Contact Information

Contact information on the agent's Profile tab may automatically update NRDS/M1 data

KB: [Change or Update Agent Information](#)

Linda Wells [Non-Member] [831010031] Add Tags

Profile More Info More Info InDevelopment Real Estate **Activity** Communication

Contact Info

None 0987 Ouster Lane Crosby MN 56441

Other linda@mailinator.com

Offices

Branchwest Realty	User - Guest	Crosby, MN	831010021
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Lists/Committees

None to display

Activity

None to display

Categories

None to display

Assigned Staff

None to display

NRDS Information

Sync to NRDS	Yes
NRDS ID	831010031
Member Type	Realtor
Active Since	4/15/2021
Local Join Date	4/15/2021
Status	Active
Status Changed Date	4/15/2021
POE Association	70008310
Association ID	8310
NRDS License Number	NJ76543
Primary State	MN
Primary Field of Business	(Residential) 100 - General Residential Sales
Office NRDS ID	831010021
Stop Mail	No
Stop Fax	No
Stop Email	No
Stop Marketing Material	No
Home Address	0987 Ouster Lane Crosby MN
Mailing Address	
Preferred Mail	Office
Preferred Publication	Office
Preferred Phone	Office

Change an Agent/Office Contact Information

If contact information tied to NRDS/M1 information is “edited”, the edits will be reflected in the NRDS/M1 information.

If you are adding new information, the system will not assume that this information should be changed in NRDS/M1

Linda Wells [Non-Member] [831010031] Add Tags

Profile More Info More Info **InDevelopment** Real Estate **Activity** Communication

Contact Info

None 0987 Ouster Lane Crosby MN 56441

Other linda@mailinator.com

Offices

Branchwest Realty	User - Guest	Crosby, MN	831010021
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Lists/Committees

None to display

Activity

None to display

Categories

None to display

Assigned Staff

None to display

NRDS Information

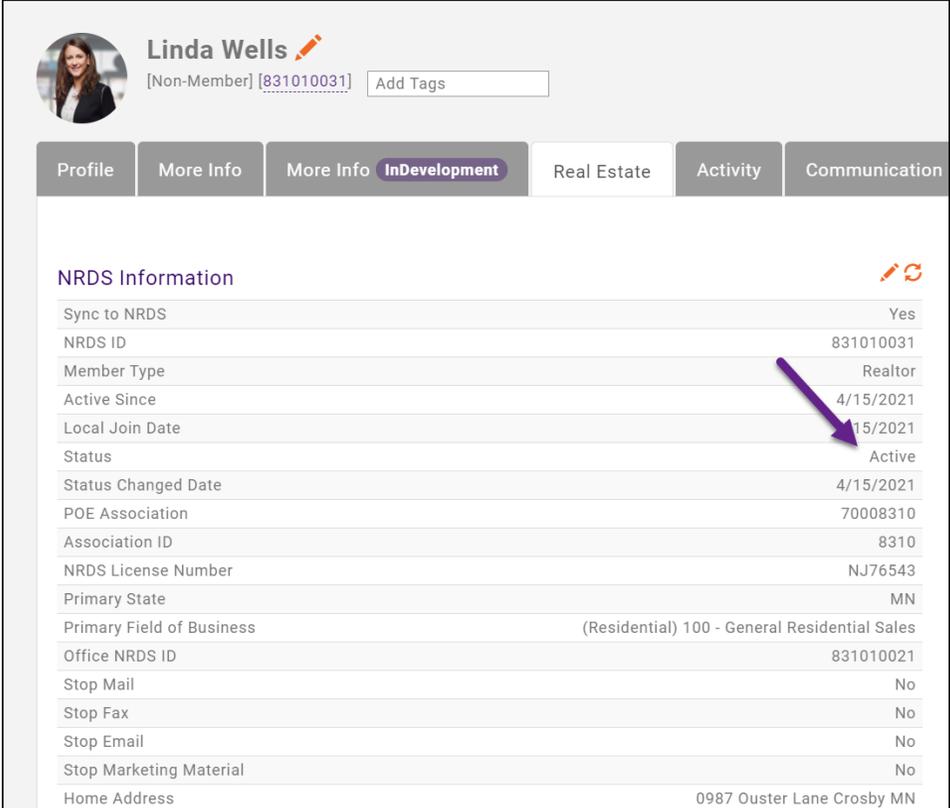
Sync to NRDS	Yes
NRDS ID	831010031
Member Type	Realtor
Active Since	4/15/2021
Local Join Date	4/15/2021
Status	Active
Status Changed Date	4/15/2021
POE Association	70008310
Association ID	8310
NRDS License Number	NJ76543
Primary State	MN
Primary Field of Business	(Residential) 100 - General Residential Sales
Office NRDS ID	831010021
Stop Mail	No
Stop Fax	No
Stop Email	No
Stop Marketing Material	No
Home Address	0987 Ouster Lane Crosby MN
Mailing Address	
Preferred Mail	Office
Preferred Publication	Office
Preferred Phone	Office

Drop/Inactivate an Agent Membership

1. On the agent's profile tab, drop the membership
2. On the agent's Real Estate tab, inactivate the Agent

Note: If you have setup rules for membership status (Setup > Membership Settings), NRDS/M1 can be automatically updated based on Membership Status

KB: [Link Membership Status to NRDS/M1 Status](#)



Linda Wells [Non-Member] [831010031] Add Tags

Profile More Info More Info **InDevelopment** Real Estate Activity Communication

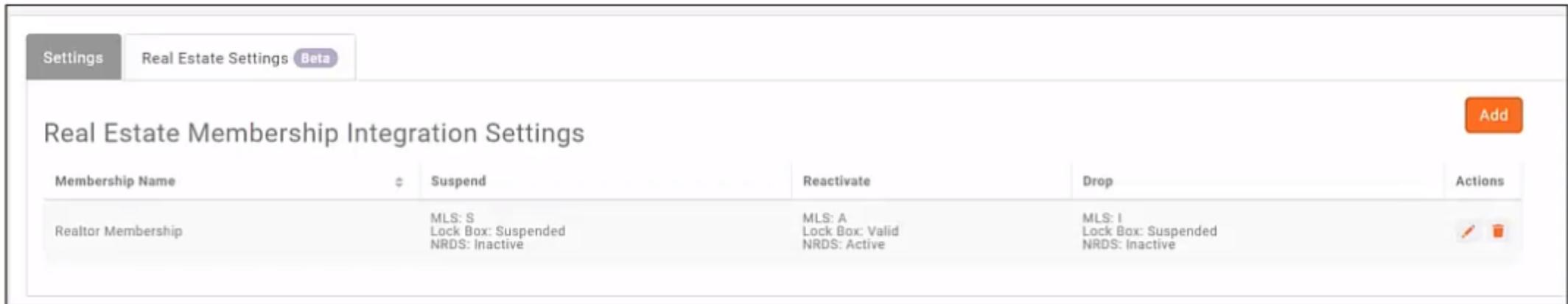
NRDS Information

Sync to NRDS	Yes
NRDS ID	831010031
Member Type	Realtor
Active Since	4/15/2021
Local Join Date	4/15/2021
Status	Active
Status Changed Date	4/15/2021
POE Association	70008310
Association ID	8310
NRDS License Number	NJ76543
Primary State	MN
Primary Field of Business	(Residential) 100 - General Residential Sales
Office NRDS ID	831010021
Stop Mail	No
Stop Fax	No
Stop Email	No
Stop Marketing Material	No
Home Address	0987 Ouster Lane Crosby MN

Membership Rules

The system can automatically update an agents status if you have defined membership rules

KB: [Tie Membership Status to NRDS/M1, MLS, Lockbox Status Rules](#)



Settings Real Estate Settings Beta

Real Estate Membership Integration Settings Add

Membership Name	Suspend	Reactivate	Drop	Actions
Realtor Membership	MLS: S Lock Box: Suspended NRDS: Inactive	MLS: A Lock Box: Valid NRDS: Active	MLS: I Lock Box: Suspended NRDS: Inactive	 

Inactivate an Office

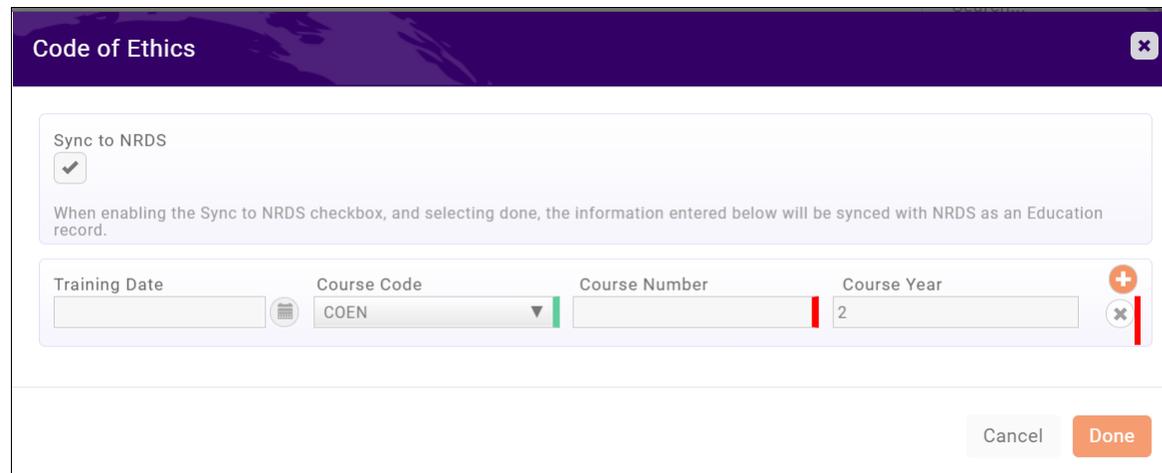
An office can only be inactivated if there are no active agents associated to it.

1. Inactivate or move the agents to new office. Ensure that the designated realtor for the offices is not moved, simply inactivated as the office record cannot be sent over without a DR
2. Change the status of the office to inactive and sync with M1
3. Turn off the sync to NRDS/M1, and remove the DR if needed

NRDS/M1 Education Records

GrowthZone currently provides the ability to track agent's Code of Ethics (COE) training. You do not need to be the POE to update an education record

KB: [Add Update Code of Ethics Training](#)



The screenshot shows a modal window titled "Code of Ethics" with a close button in the top right corner. Inside the modal, there is a "Sync to NRDS" section with a checked checkbox. Below this is a note: "When enabling the Sync to NRDS checkbox, and selecting done, the information entered below will be synced with NRDS as an Education record." The main form area contains four fields: "Training Date" (empty), "Course Code" (a dropdown menu showing "COEN"), "Course Number" (empty), and "Course Year" (a text input containing "2"). There are plus and minus icons on the right side of the Course Number and Course Year fields. At the bottom right of the modal are "Cancel" and "Done" buttons.

Financial Record Setup

- ✓ GrowthZone will enable the Financial Record sync for you
- ✓ During on-boarding you will be asked if you wish to send financial records. If you have been syncing these records in some fashion (perhaps via file) in the past, the sync should be enabled, as we do not currently have the ability to retrieve the financial records if the initial setup has not been completed

Financial Record Setup

- ✓ GrowthZone relies on the mapping of Goods & Services to specific “Payment Types”
- ✓ In order to get the payment type to be included in the sync, we need to be able to identify what purchase items should be mapped to a particular purchase type

NRDS Financial Mapping

In the below section, identify which Saleable items should be mapped over to the appropriate NRDS Payment types. This information is used to create Financial Records within NRDS when payments are sent in for those Saleable items.

Financial Mapping

Saleable Item	NRDS Payment Type
National Dues	NATL
State Dues	STAT
RPAC	RPAC
Local Association Dues	LOCL

Setup

The Goods & Services mapped are those that reflect the Financial Records that you wish (or are required) to send to NRDS/M1. If you are not certain what information is to be sent, refer to your state bylaws

NOTE: NAR Ecommerce is NOT required to send over financial records

NRDS Financial Mapping

In the below section, identify which Saleable items should be mapped over to the appropriate NRDS Payment types. This information is used to create Financial Records within NRDS when payments are sent in for those Saleable items.

Financial Mapping

Saleable Item	NRDS Payment Type
National Dues	NATL
State Dues	STAT
RPAC	RPAC
Local Association Dues	LOCL

12 ?

Setup

The NRDS/M1 Standard Payment Types:

- NATL: NAR dues
- IMAG: NAR's Ad Campaign assessment
- STAT: State dues
- LOCL: local dues
- RPAC: RPAC
- LATE: Late Fee

If you are in a state where the state association requires you add the Financial records into NRDS/M1, such as California, you should check with your state for the full list of acceptable Payment Types

Business Rules

Follow the Rules!



- National dues can only be sent once a year (associations are not supposed to allow them to be paid monthly and NRDS/M1 will not accept monthly reported National dues payments), on the date they are paid. Other dues, such as state and local, can be sent monthly, quarterly, or yearly, on the date they are paid
- GrowthZone will track if dues are paid late, and report to NRDS/M1 accordingly
- You cannot change or delete an existing Financial record. Similar to an accounting general ledger entry, once it is posted you cannot delete it

Business Rules



- NRDS/M1 will not accept a Financial record for an **inactive** member. The member's status must be A, P or S in M1
- M1 will also check that the Office ID is an active office in M1 and that the member is a member of the association in the Primary Association ID field
- A Billing Year is sent with the records. If an association bills their members for the upcoming year's dues in advance, the Billing Year that is sent, uses the Invoice Date or Activation Date, whichever is later, to determine the Billing Year

Business Rules

With the proper setup, and the sync enabled, with no further interaction on your part when a payment is received for one of the mapped items, the record will be sent to NRDS/M1 within 10 minutes

Activity		
6/4/2020	Integration Sync	Member information published to NRDS.
6/4/2020	Integration Sync	Payment information was published to NRDS.
6/4/2020	Integration Sync	Payment information was published to NRDS.

Errors

M1 Errors and validation warnings are visible on a member's Activity tab, and in the Event Log. KB: [Review NRDS/M1 Event Log](#)

Activity		
6/4/2020	Integration Sync	Member information published to NRDS.
6/4/2020	Integration Sync	Payment information was published to NRDS.
6/4/2020	Integration Sync	Payment information was published to NRDS.
6/4/2020	Integration Sync	Payment
6/4/2020	Integration Sync	Payment

Log Details

Failed to Synchronize the Member Financial.Code=3765 Text=Sender716007655 s not the POE for Member 161606390

Close

Review the Event Log

Issues identified during synchronization may be visible in the event log. Most events are generated because of malformed or missing information

The screenshot displays the 'Event Log Filter' interface. At the top, there is a dark purple header with the title 'Event Log Filter' and a close button. Below the header, there are three filter sections: 'Log Date Range' with a dropdown menu showing 'Aug 5, 2020 - Aug 19, 2020', 'Log Severity Level' with a dropdown menu showing 'Error', and 'Log Type' with a dropdown menu showing 'NRDS Event'. Below these filters, there is a search bar with the text 'Search...', a 'Customize Results...' button, and a 'Log type: NRDS Event x [Clear All]' button. The results section shows a table with one entry. The table has columns for Name, Type, Message, Severity, Created Date, and Actions. The entry for '1B Johnson' is an 'NRDS Event' with the message 'NRDS sync failed', severity 'Error', and created date '12/9/2019 1:55 PM'. The Actions column contains icons for edit, delete, and info.

Name	Type	Message	Severity	Created Date	Actions
1B Johnson	NRDS Event	NRDS sync failed	Error	12/9/2019 1:55 PM	

Review Updates Received from NRDS/M1 Log

On each agent or office Activity tab, any changes will be logged. In addition, you can use the Updates Received from NRDS/M1 report to review all activity over a specific date range

KB: [Updates Received from NRDS/M1](#)

Search... Show only... Customize Results...

Result Count: 1831

Name	NRDS Id	Tags	Primary Contact Display Name	Activity Date	Field Name	Change Details
Cheri Navin	845593063	Member		1/12/2022 4:04 PM	NRDSOfficeId	NRDS Office ID set to (89202638) by NRDS.
Cheri Navin	845593063	Member		1/12/2022 4:04 PM	PrimaryState	NRDS Primary State set to (VA) by NRDS.
Cheri Navin	845593063	Member		1/12/2022 4:04 PM	NRDSStatus	NRDS Status set to (Active) by NRDS.
Cheri Navin	845593063	Member		1/12/2022 4:04 PM	PMAssociationID	PM Association ID changed from (8310) to (8455) by NRDS.

Questions?

Training and Support

Customer Service Hours:

Phone: 7 a.m. – 5 p.m. CT (Monday, Tuesday, Thursday, and Friday)

800.825.9171, Option 4, then Option 2

Chat: 7 a.m. – 6:45 p.m. CT (Monday, Tuesday, and Thursday)

7 a.m. – 4:45 p.m. CT (Friday)

Online Support Documentation: [GrowthZone Knowledge Base](#) »

Online Training Calendar: [Training Event Calendar](#) »

Live Chat: [GrowthZone Support Portal \(chat on far right\)](#) »